Objective: Create a Shopify app that allows us to create a collection based on a list of tags that we want to include and exclude.

Technical requirements: App must be able to communicate with Alchemer survey reporting and/or Google Sheet, receiving a list of tags to include and exclude and subsequently creating a collection on Shopify.

1. As a result of a survey that has been taken by customer **and then admin-only questions are completed,** you will take from Alchemer/export file
    ○ When survey response is edited, the collection should update accordingly
    ○ customer name
    ○ Customer email
        ■ The collection will be labeled with the customer name and address
            ● Customer name and email address comes from survey responses
    ○ Inclusions are tags in the survey results that have "+" in front
        ■ Not to be confused with tags that have X+Z to indicate "and" logic
    ○ Exclusions are tags in the survey results that have "-" in front
2. A link to the collection will automatically go to the customer's Shopify profile in the Customer Notes. Email notification of completed collection will be sent every time.
    ○ Customer cannot see the link, but anyone on the internet with the link can access the link if they have it
    ○ The collection should not be indexed (searchable) by google, so if someone searches their name or email address on the internet, this collection will not appear
    ○ App will search our orders and add the collection link to the customers order for a "Box"
    ○ LATER DEVELOPMENT to be aware of NOT FOR THIS SCOPE
        ■ Link for customer to edit their survey will be in their Shopify account
3. The collection updates in real time according to new products added and as products sell - some queue is acceptable, but it should update a couple times daily at a minimum
    ○ If the inclusions/exclusions of a collection are edited, that should jump to the top of the queue and update almost immediately
4. App contains Collection list view, Collection Review page, Collection Builder page
    ○ Collection Builder page
        ■ Collections can be created here, without survey response
            ● Admin would enter collection
            ● name, email if they wish to associate the collection with a customer, inclusions and exclusions
                ○ If an email is entered, we need to reference that email against our customer list and if a match is found, that collection link should go into the Customer Notes
                    ■ You should be able to assign the same email (the same customer) to multiple collections. In that

case, the Customer Notes section would have multiple collection links.
- You should also be able to enter multiple emails for any collection, and that collection would be assigned to all of those customers.
- Inclusions and exclusions are typed and entered individually. You type one, press enter, type another, press enter, etc.
  - We can talk about what's involved in making tag entry auto-complete
- Collection List page organized in reverse chronological order shows
  - Collection Name
    - **When collection was generated by survey results, the collection name = Survey Name + Date survey last modified**
    - When collection is built manually in this app, not from survey results, this name is whatever the admin enters
    - There is an icon next to each collection that you can click to duplicate the collection
      - It will open the collection builder page with the fields filled out and you can edit them, including the name
  - Associated Email
    - When collection was generated by survey results, this name = Customer email address
  - Link to Survey results (when applicable)
- Collection Review
  - All fields are the same as in Collection Builder, but when you are in Collection Review you are viewing a collection that has already been created, so all the fields are already filled out
    - Everything is editable including Inclusions and exclusions
      - You can add or remove emails from the collection, which should update the customer profiles in shopify
5. Logic
   - Exclusions always trump inclusions
   - Tags that are comma separated have OR logic
   - Tags that have "+" between them are "combo rules" and have "and" logic
   - Example
     - **Include**: pink, sweatshirt, blue, new york, cat+green
     - **Exclude:** black, red, pants, pink+sweatshirt
     - **Logic**
       - Include any products with the tags [pink] or [sweatshirt] or [blue] or [new york] or that have tags {[cat] AND [green]}
       - Exclude any products with the tags [black] or [red] or [pants] or that have tags {[pink] AND [sweatshirt]}

- In effect this means that while pink items will be included and sweatshirts will be included, any sweatshirts that are black, red, or pink will be excluded.

6. Survey interaction
  ○ In the survey, I must be able to note somehow (add some CSS or ?, or open to suggestions) so that there are some questions that you ignore
  ○ I need to be able to indicate on the survey if there are questions whose answers should always be inclusions, even if there isn't a "+" sign in front.
    ■ For example, when we ask them "what are you into" and they say Lakers and that "Lakers" is in our bank of suggestions that list does NOT contain the "+" sign in front of every value. So I will need a way for the report to append a "+" to every value in a response for some questions.
      ● I'm telling customer to enter anything outside of the suggestions into the comment box. You will IGNORE the comment box.
  ○ How to deal with customers editing the survey:
    ■ When admin questions for a given survey are answered there would be a webhook that tells your app " survey ID #1234 is complete" .
    ■ Your app creates a new collection with that survey ID and completion date in the title
    ■ Now some respondent and subsequently the admin from survey #1234 edit and submit again so your app would get another webhook that says " survey 1234 is complete".
      ● Your app would have to check the current collections.
      ● If any of your current collections have the survey #1234 association, then the collection would be replaced with the original collection tied to survey 1234 , instead of creating a new survey.
      ● We CANNOT distinguish a webhook that tells you it's a second-time completion vs. a first time completion of a survey.

Must tell you which questions I want to you to ignore the answer for and which questions I want you to append a "+".

- Questions to answer after getting started
- Can i change the reporting values without messing up the connection to CCA?
- Can i change the order of questions
- Can i change the options of a question

Mockups on next page. *Note about all mockups: Where it says "Date Created" it should instead be "Last Modified," and that time should update anytime the collection is modified.

Only change to wireframe mock up is **When collection was generated by survey results, the collection name = Survey Name + Date survey last modified**

Custom Collection App: Review

Collection Name	Collection Email Associated	Date Created	Link to Survey Response
samantha@xyz.com	samantha@xyz.com	1/1/1, 3:00 PM	http://resultssamantha.alchemer.xyz

⊞

INCLUDE   Green ⊗   Pink+sweatshirt ⊗   S ⊗   Add tag...

EXCLUDE   Blue ⊠   L ⊠   Jacket+M ⊠   Add tag...

Save and update

Wireframe

Custom Collection App: List View

Create collection

Collection List   Search name/email

	Collection Name	Collection Email Associated	Date/Time Created	Link to Survey Response
↗ ⎘	samantha@xyz.com	samantha@xyz.com	1/1/1 3 PM	http://resultssamantha.alchemer.xyz
↗ ⎘	sawan@sawan.com	sawan@sawan.com	1/1/0 2:15 PM	http://resultssawan.alchemer.xyz
↗ ⎘	Black Cat Tees	Not applicable	1/1/00 1:30 PM	Not applicable

⊞

Click on name to see Collection Builder

⊞

This is how you DUPLICATE a collection, it will open the Collection builder page with everything filled out which can be edited

If the collection was built in-app and not from survey then this is N/a

Reverse Chronological Order

If the collection was built in-app and not from survey then this is N/a

Click here to view collection- open new tab

Wireframe

This page shows a new collection being built, not connected to a survey. Name is entered manually. Name is required

If we want to associate this collection with an user so that the link lives in their **internal** Customer Notes, we can enter email address(es) here- comma separated

Automatic, include time stamp

In this case, not applicable

Custom Collection App: Builder

Collection Name

[Enter]

Collection Email Associated

[Entry is optional]

Date Created

1/1/1

Link to Survey Response

N/A

⊞

INCLUDE   Green ⊗   Pink+sweatshirt ⊗   S ⊗   Add tag…

EXCLUDE   Blue Ⓧ   L Ⓧ   Jacket+M Ⓧ   Add tag…

Save and create

Success page shows link to new Collection and asks you if you want to create another collection or return to Collection List